

## EDUCATIONAL ASSISTANCE FOR RECRUITMENT AND RETENTION: ENABLING AN OPERATIONAL RESERVE

BY

LIEUTENANT COLONEL MARIA I. LOPEZ  
United States Army Reserve

DISTRIBUTION STATEMENT A:

Approved for Public Release.  
Distribution is Unlimited.

USAWC CLASS OF 2008

This SRP is submitted in partial fulfillment of the requirements of the Master of Strategic Studies Degree. The views expressed in this student academic research paper are those of the author and do not reflect the official policy or position of the Department of the Army, Department of Defense, or the U.S. Government.



U.S. Army War College, Carlisle Barracks, PA 17013-5050

Report Documentation Page			Form Approved OMB No. 0704-0188		
Public reporting burden for the collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Washington Headquarters Services, Directorate for Information Operations and Reports, 1215 Jefferson Davis Highway, Suite 1204, Arlington VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to a penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number.					
1. REPORT DATE <b>15 MAR 2008</b>		2. REPORT TYPE <b>Strategy Research Project</b>		3. DATES COVERED <b>00-00-2007 to 00-00-2008</b>	
4. TITLE AND SUBTITLE <b>Educational Assistance for Recruitment and Retention: Enabling an Operational Reserve</b>			5a. CONTRACT NUMBER		
			5b. GRANT NUMBER		
			5c. PROGRAM ELEMENT NUMBER		
6. AUTHOR(S) <b>Maria Lopez</b>			5d. PROJECT NUMBER		
			5e. TASK NUMBER		
			5f. WORK UNIT NUMBER		
7. PERFORMING ORGANIZATION NAME(S) AND ADDRESS(ES) <b>U.S. Army War College ,122 Forbes Ave.,Carlisle,PA,17013-5220</b>			8. PERFORMING ORGANIZATION REPORT NUMBER		
9. SPONSORING/MONITORING AGENCY NAME(S) AND ADDRESS(ES)			10. SPONSOR/MONITOR'S ACRONYM(S)		
			11. SPONSOR/MONITOR'S REPORT NUMBER(S)		
12. DISTRIBUTION/AVAILABILITY STATEMENT <b>Approved for public release; distribution unlimited</b>					
13. SUPPLEMENTARY NOTES					
14. ABSTRACT <b>See attached</b>					
15. SUBJECT TERMS					
16. SECURITY CLASSIFICATION OF:			17. LIMITATION OF ABSTRACT <b>Same as Report (SAR)</b>	18. NUMBER OF PAGES <b>28</b>	19a. NAME OF RESPONSIBLE PERSON
a. REPORT <b>unclassified</b>	b. ABSTRACT <b>unclassified</b>	c. THIS PAGE <b>unclassified</b>			

The U.S. Army War College is accredited by the Commission on Higher Education of the Middle State Association of Colleges and Schools, 3624 Market Street, Philadelphia, PA 19104, (215) 662-5606. The Commission on Higher Education is an institutional accrediting agency recognized by the U.S. Secretary of Education and the Council for Higher Education Accreditation.

USAWC STRATEGY RESEARCH PROJECT

**EDUCATIONAL ASSISTANCE FOR RECRUITMENT AND RETENTION: ENABLING  
AN OPERATIONAL RESERVE**

by

Lieutenant Colonel Maria I. Lopez  
United States Army Reserve

Dr. Sara Morgan  
Project Adviser

This SRP is submitted in partial fulfillment of the requirements of the Master of Strategic Studies Degree. The U.S. Army War College is accredited by the Commission on Higher Education of the Middle States Association of Colleges and Schools, 3624 Market Street, Philadelphia, PA 19104, (215) 662-5606. The Commission on Higher Education is an institutional accrediting agency recognized by the U.S. Secretary of Education and the Council for Higher Education Accreditation.

The views expressed in this student academic research paper are those of the author and do not reflect the official policy or position of the Department of the Army, Department of Defense, or the U.S. Government.

U.S. Army War College  
CARLISLE BARRACKS, PENNSYLVANIA 17013



## **ABSTRACT**

AUTHOR: Lieutenant Colonel María I. López

TITLE: Educational Assistance for Recruitment and Retention: Enabling an Operational Reserve

FORMAT: Strategy Research Project

DATE: 25 March 2008      WORD COUNT: 5,494      PAGES: 28

KEY TERMS: Army Reserve Benefits, Tuition Assistance, Retention

CLASSIFICATION: Unclassified

The Army Reserve is a key component of the all-volunteer force. The Army Reserve is facing major challenges in sustaining an operational force within a Cold War context. To avoid a return to the draft, it is paramount to properly fund and manage the Tuition Assistance (TA) Program in order to retain quality Soldiers by supporting their educational needs.<sup>1</sup> The Army Reserve Education Benefits, specifically the TA Program, supports the development of warrior-citizens into an operational force by attracting, maintaining, and retaining highly qualified applicants. However, many Reserve Soldiers are abandoning their military careers due to consecutive mobilizations and cumbersome TA Program procedures.

Recruiting the all-volunteer force is more difficult and costly today. According to the Commission on the National Guard and Reserves (CNGR), the military services face extremely stiff competition from civilian employers who are also seeking to recruit and retain the quality workforce required in the 21st century.<sup>2</sup>



## EDUCATIONAL ASSISTANCE FOR RECRUITMENT AND RETENTION: ENABLING AN OPERATIONAL RESERVE

### Introduction

To meet the challenges of the 21st century, the Army has been transforming to build an operationally relevant and capable force. According to the 2007 Army Modernization Plan, for decades the Reserve Component has served as our nation's strategic reserve. In this new century, the Army Reserve continues to be an integral part of the Operational Force, serving alongside the Active Component.<sup>3</sup> Today, the Army Reserve end-strength is 205,000.<sup>4</sup> Approximately 60 percent of the Army's combat service support capability is in the Army Reserve, and the Army Reserve comprises more than 90 percent of the Army's civil affairs capability and more than 50 percent of the Army's medical capability.<sup>5</sup> It also provides a quarter of the Army's training and mobilization base expansion capability. The Army Reserve has more than 2,000 units in the United States, Guam, the Virgin Islands, Puerto Rico, and Germany.<sup>6</sup> It empowers the Active Army to operate lighter in a more streamlined way, thereby making it more efficient and effective.<sup>7</sup>

The latest Commission on the National Guard and Reserves (CNGR) report to Congress and the Secretary of Defense asserts that the current reliance on the reserve component as an operational force, however, is something entirely new, unforeseen, and unplanned. For generations, the reserve components have mobilized in times of crisis to significantly increase the size of the military; they have actively participated in war and have returned home at the end of the conflict.<sup>8</sup> The concept of an operational reserve occurred almost by default, in response to current and projected needs for forces of greater size than that available from the active component.<sup>9</sup> As Senator John



Warner testified before the Commission, “The roles and missions of the National Guard and Reserve are fundamental to the historic challenge we face to preserve our freedom against the world-wide threat of terrorism.”<sup>10</sup>

We are currently engaged in Iraq and Afghanistan, the longest wars in U.S. history fought with an all-volunteer force. Although the U.S. military is the second largest military force in the world today, it currently constitutes the smallest wartime percentage of our population ever assembled for combat.<sup>11</sup> Current Department of Defense (DoD) plans project the continued use of the reserve components as an operational force for the foreseeable future. The CNGR Commission believes that this reliance on the reserve components will be enduring. Since the first Iraq War, the Army has relied increasingly on the reserves.<sup>12</sup>

Reserve Soldiers come from diverse civilian backgrounds, bringing skills that often complement their military training, providing specialized resources for military missions worldwide. Despite sustained levels of high operational tempo since September 11, 2001, Army Reserve Soldiers remain committed to mission accomplishment and military values. These “citizen warriors” represent their communities and neighbors. They are the teachers and coaches within our schools, family care physicians, and the parents of our children’s friends.<sup>13</sup>

The status of “citizen warrior,” according to the Commission, represents an important connection between the deployed military and their communities and employers back home, a connection that fosters public support for military members.<sup>14</sup> Another contribution discussed by the Commission is the valuable civilian skills Reservists bring to their service, along with training and professional experiences that

are not easily maintained in the active component. Reservists are skill-rich citizen-warriors who provide valuable capability for our military, especially in reconstruction efforts and policing activities.<sup>15</sup> In many ways, the men and women in the reserve components have enabled our national leaders to avoid reinstating the draft.<sup>16</sup>

Army Reserve Soldiers are making significant sacrifices for our country so that we may live in peace and maintain our freedom. Our country should equally commit to our Soldiers by providing the best training, resources, and educational support to assure their success. The rising demand for Army Reserve combat support and combat service support capabilities in support of the Global War on Terror (GWOT) currently challenge Reserve leaders to recruit and retain enough citizen-Soldiers to sustain an operational reserve force.

#### Role of Army Force Generation Model

Army Reserve units must be alert and ready to immediately respond to our nation's needs and the Army's needs. The 2006 Army Campaign Plan outlines the purpose of the Army Force Generation (ARFORGEN) model: "to provide Combatant Commanders and Civil Authorities with trained and ready units, task organized in modular expeditionary forces, tailored to Joint mission requirements, with sustainable campaign capability to conduct and continue full-spectrum operations in persistent conflict."<sup>17</sup> So in the ARFORGEN process, units transition through the force pools based on appropriate commander assessments that the unit is trained, equipped, manned, and available for deployment, thereby meeting force level capabilities designated by the Commander, U.S. Forces Command.

The Army Reserve Training Strategy is designed to support ARFORGEN. The ARFORGEN strategy ensures that deploying units will be fully trained as cohesive units, prepared to use the most modern equipment.<sup>18</sup> ARFORGEN must flexibly meet changing operational requirements. Thus operational requirements drive the ARFORGEN process which, in turn, drives training and resourcing strategies. The Army Reserve model is integrated into this process over a five-year cycle. Under the ARFORGEN model, a Soldier will train for a specific number of days in the five-year cycle, will be available for mobilization once every five years, and will deploy if needed. This kind of predictability in the training and mobilization cycle gives Soldiers the ability to plan important aspects of their lives, including their education, career, and personal lives.<sup>19</sup>

#### Other Obstacles to Army Reserve Recruiting and Retention

Army Reserve Soldiers lack close knowledge of the ARFORGEN concept and deployment timelines. Soldiers are having problems balancing their Army Reserve participation, their civilian jobs, and their family responsibilities. Deployments beyond 12 months put a strain on their families. Most employers are supportive or neutral, while some believe the Soldiers volunteered to escape their jobs, especially if the Army Reserve pays more than their civilian job.<sup>20</sup>

With today's high operational tempo and the continued long war on terror, the Army is already stretched thin. It cannot meet today's operational requirements without drawing significantly on the Reserve Components. Just as the total force is transforming to build a more capable force, the Army Reserve is also transforming to serve in ongoing and future operations at home and abroad. So it is important that the

Army Reserve forces are fully manned, trained, and equipped to perform missions effectively. At the same time, our Soldiers and new recruits expect to be remunerated for their time and sacrifice. A reservist's tour of duty has more than doubled from an average of 156 days during Operation Desert Shield/Desert Storm to 342 days during Operation Enduring Freedom and Iraqi Freedom.<sup>21</sup>

Use of Reserve component personnel has increased from 12.7 million man-days in FY 2001 to 61.3 million man-days in FY 2006 (a total that includes both non-mobilization and mobilization support).<sup>22</sup> The Army Reserve, as an integrated part of the operational force, can expect to be mobilized on a regular basis for the indefinite future.<sup>23</sup>

#### Recruitment and Retention Incentives

As part of the support initiatives in the President's 2008 budget proposal to offer incentives to recruit and retain Army Reserve Soldiers, the Army Reserve is contributing to many incentives designed to recruit and retain high quality Soldiers. These incentives enable the Army Reserve to fulfill the manning requirements of the ARFORGEN strategy and to promote retention and stability for ARFORGEN units targeted for deployment.<sup>24</sup> College attendance is at an all-time high and growing. The National Center for Education Statistics reported that approximately 67 percent (2 out of 3) of high school graduates immediately enroll in and attend a two- or four-year college. These statistics portend numerous recruiting challenges, especially for the Army Reserve.<sup>25</sup> However, a recent foreseen crisis in funding for federally subsidized, low-cost student loans that is affecting student loan providers nationally has the potential to impact federal student aid.<sup>26</sup> This shift in funding college students enhances the option

to shield college students who join the Army Reserve from deployment while enrolled in higher education in exchange for a longer service obligation.

Recruiting and training personnel for the myriad skills required in a modern military force are very costly activities, as the Commission's report tells us. DoD's planned expenditures for training and education in FY 2008 exceed \$8.5 billion.<sup>27</sup> Additionally, on January 11, 2007, Secretary of Defense Gates announced that he was recommending an end-strength increase of 6,000 in the Army Reserve.<sup>28</sup> Certainly, recruiting and retention are key indicators of the sustainability of the force, particularly when operational tempo is high.<sup>29</sup>

So maintaining the personnel strength and sustaining acceptable retention rates of the Army Reserve components, while deploying significant numbers of personnel to the Iraq and Afghanistan operations, has been an on-going challenge.<sup>30</sup> The Army Reserve faced its largest shortfall in recruiting during Fiscal Year (FY) 2005, when the end-strength dropped from 204,000 troops (in FY 2004) to 189,000—16,000 below the current authorized level of 205,000.<sup>31</sup> And more challenges are emerging. The propensity of our nation's youth to enlist in the military hit a historical low of 9 percent in June 2007, as reported by the Commission.<sup>32</sup>

DoD estimates that more than half the youth in the U.S. population between the ages of 17 and 24 do not meet the minimum requirements to enter military service. Overall, seven out of ten are not eligible for the military without a waiver; most of the disqualifications relate to obesity.<sup>33</sup> Approximately 22 percent of America's youth exceed the limit set for enlistees' body mass index. Only 79 percent of the new recruits entering the Army in FY 2007 possessed a high school diploma (DoD standard is 90

percent), and the Army approved more waivers for candidates with a criminal history (10 percent of all recruits) than it has done in years past.<sup>34</sup>

So the Army has continued to recruit and retain service members to meet its designated end-strengths, but its success has not come without a high price. The Army spends more on recruiting than the other armed services. According to the Commission, the Army spent \$126 million on advertising in 2001 and \$216 million in 2005.<sup>35</sup> In FY 2006, DoD spent \$1.8 billion on advertising and recruiting; the Army's cost-per-accession (or enlistee) was \$18,327, and cost-per-accession is projected to rise to \$18,842 in FY 2008. However, these numbers do not include supplemental expenditures for recruiting. The Office of the Under Secretary of Defense for Personnel and Readiness estimated that the Army's FY 2007 cost-per-accession, with supplemental spending, was \$22,000; in FY 2008, it is projected to be \$28,000.<sup>36</sup>

Historically, the Army Reserve has recruited heavily from individuals with previous active duty service – “prior service” recruits who have already received training and possess military skills. Over the past decade, from FY 1997 to FY 2006, all DoD reserve components have seen their proportion of prior service enlistments decline.<sup>37</sup> Although Congress recently addressed this problem, the Army's Military Personnel Management Office reports that the Guard and Army Reserve are short approximately 10,000 company-grade officers – the lieutenants and captains who provide critical small-unit leadership.<sup>38</sup>

As the Army Reserve continues its transformation efforts, training Soldiers and growing leaders is another part of the Army Reserve's responsibility to the total force.<sup>39</sup> In order to maintain a quality force, it is critical that the Army Reserve addresses

selected programs and offers incentives and benefits to recruit and retain these high-quality Soldiers. Incentives, or the lack thereof, can dramatically affect the way Army Reserve Soldiers are recruited and trained.

To meet the demands of today's Army, the Army Reserve supports and sustains the All-Volunteer Force through education initiatives. Many college students have been paying for their education through their service and obligations to the Army Reserve. Education plays a pivotal role in a reservist's career by enhancing promotion opportunities. Tuition Assistance (TA) provides financial assistance for voluntary off-duty education programs in support of a soldier's professional and personal self-development goals.<sup>40</sup> Education benefits definitely contribute to retention and recruiting of Army Reserve Soldiers. In 2007, 19,088 Army Reserve Soldiers used TA, 1,021 earned degrees. These statistics provide clear evidence of the desire of Army Reserve Soldiers to further their education.<sup>41</sup>

#### Tuition Assistance Program Benefits

The goals of the Tuition Assistance (TA) Program are to retain quality Soldiers, to enhance their career progression, and to increase the combat readiness of the Army. Army Reserve Soldiers in an active drilling status, both enlisted and officers, are authorized TA of \$250 per semester hour, with a cap of \$4,500 per fiscal year. Soldiers must attend accredited institutions, must successfully pass coursework, and must apply for TA on-line. Eligibility for TA ends when a Soldier achieves a Masters Degree or first professional degree (for example, Juris Doctor Law Degree, or Master of Architecture).<sup>42</sup> According to the U.S. Army Reserve Command (USARC), the Army Reserve pays "up-front" tuition costs directly to colleges and other institutions. The Army

Reserve pays TA subject to availability of funds.<sup>43</sup> However, the Army Reserve currently spends approximately \$40M per year on TA, but is funded at only \$25M.<sup>44</sup> Of the \$40M spent on TA in FY06, \$3.4M was paid to contract staff to process TA applications.<sup>45</sup>

The Army Reserve Voluntary Education Services, in addition to the TA Program, provides other educational services. According to *Stand-To*, a subscription-based, electronic publication aimed at keeping Army leaders informed,<sup>46</sup> the Army Reserve Voluntary Education Services is a DoD program that provides continuing opportunities for Reserve Soldiers through voluntary education. This DoD mandated program is executed through commanders of Regional Reserve Commands (RRCs) worldwide, and U. S. Army Reserve Command (USARC) serves as the Executive Agent.<sup>47</sup> The program's basic goal is to provide lifelong learning opportunities for citizen-Soldiers that further their personal and professional development.

The Army Reserve Voluntary Education Services program has provided an assortment of educational opportunities and support since its conception. These programs and support include:<sup>48</sup>

- Tuition Assistance (\$250 per semester hour/\$4,500 annual cap)
- Montgomery G. I. Bill (Chapter 1606 and Chapter 1707 for OIF/OEF Veterans)
- Defense Activity for Non-Traditional Education Support (DANTES) Testing Program (CLEP and DSST)
- Student Guide to Success
- Credit for Military Experience
- Certification and Licensure



- Army/American Council on Education Registry Transcript System (AARTS)
- Troops-to-Teachers Program
- Spouse-to-Teachers Program

Another major retention incentive benefit program and one of the most popular in the Army Reserve is the referral bonus. In June 2007, the Army Reserve initiated its new Army Reserve Recruiting Assistance Program to help increase or fill its ranks. The program allows individual Soldiers to become recruiting assistants to work at the grassroots level to recruit in the community where they live and work. For each successful recruiting effort, the recruiting assistant earns a financial gratuity of up to \$2,000.<sup>49</sup>

Current research does not adequately correlate the TA incentive and Army Reserve recruiting and retention. It does not account for Soldiers' propensity to join, stay, or leave the military regardless of their use of TA. A complete analysis of the interdependence between TA, administrative and management procedures, AR recruiting, and Army Reserve retention is needed to ensure the best application of this costly program. The Army Reserve realizes that the market is very competitive for potential recruits and tailors educational incentives to attract the best candidates with the right skills to join the ranks.<sup>50</sup>

The Army Reserve exceeded its recruiting and retention goals for 2007, achieving 101 percent of accessions (35,734 accessions with a goal of 35,505).<sup>51</sup> Effective recruiting and retention efforts are vital to ensure that the Army Reserve sustains and supports the total force. At the same time, the use of costly incentives must be constantly monitored to get the most out of DoD resources.

Another educational program is the Army Reserve Education Career Stabilization (ECS) Enlistment Program tailored to expand recruitment in the college market, to increase Army Reserve accession, and to maintain Army Reserve end-strength.<sup>52</sup> This recently released ECS program gives non-prior service candidates the chance to serve in the Army Reserve and complete up to four years of post-secondary education. The ECS program allows future candidates to join the Army Reserve for a 6-year enlistment, with a guarantee that they will not be mobilized during their first two years of college.<sup>53</sup> Time will reveal the value of this program to the Army. But it will surely be costly.<sup>54</sup>

Policy and management for TA previously resided in the Human Resource Center-Saint Louis, but is now at the USARC. The TA application process is extraordinarily long and difficult to negotiate, even though the Army Reserve has employed 65 contract staff to assist in processing TA. Soldiers frequently do not understand the proper procedures for applying for TA and do not complete the application. Soldiers must apply for TA on-line and must exclusively use Internet Explorer 6.0 enabled with JavaScript. As a follow-up, Soldiers must then comply by handing four separate hard copy documents to their RRCs. This year 3,868 applications were sitting in the import file on Web-Enabled Education Benefits System (WEBS). Last year, USARC staff responded to 87 Congressional Complaints on TA, the majority related to delays in administrative procedures due to the competence and workload of Educational Services Specialists.<sup>55</sup>

WEBS is the single source for Army Reserve Tuition Assistance (TA) applications. It pulls information from numerous external sites. Although it offers the best option for applying, WEBS also protects the Soldiers' confidential information by requiring them to

enter (or re-enter) their Army Knowledge On-line (AKO) ID and password when necessary for security purposes. Some of WEBS content is presented in the Adobe Acrobat portable document format (PDF) and requires the Adobe Acrobat Reader version 6.0 or later to view these documents.<sup>56</sup>

In addition to a challenging application process, the Army Reserve TA Program pays “up-front” tuition, causing frequent recoupment issues when Soldiers either fail a course or withdraw and receive an incomplete. Subordinate commands use three methods of payment for college invoices, and colleges frequently complain about late payments. Army Resource Management Offices in some subordinate commands do not consistently distribute TA funds, which are supposed to be fenced. The Army Reserve collects no data on the number of degree/certificate completions. In addition, no data is maintained that indicates the correlation between TA costs and the resulting recruiting and retention outcomes.<sup>57</sup>

#### Army Reserve Accession and Retention Analysis (ARARA) Study

The Army Reserve conducted an Accession and Analysis Study in FY 2007. The purpose of the ARARA Study was to determine what monetary and non-monetary incentives would best improve recruiting and retention in the Army Reserve. The focus of the study was directed towards first-term enlistees, company grade officers, prospects, and Soldiers leaving active duty with a remaining Reserve commitment. This study interviewed 200 Soldiers in Kuwait and surveyed over 26,000 Soldiers via AKO. Their responses were fairly consistent. More pay was the most favored incentive for those Soldiers surveyed, followed by full college student loan repayment. The study also concluded that 78 percent interviewed and 61 percent surveyed would have joined

the Army regardless of receiving any bonuses. The majority of the Army Reserve Soldiers interviewed indicated that their career plans would not change if they knew that they would deploy for at most one 6-to12-month period every 5 to 6 years. Of those who said their career plans would change, most indicated that they are more inclined to stay and reenlist.<sup>58</sup>

Additionally, the majority of Army Reserve Soldiers interviewed received the Military Occupational Specialty that they wanted when they joined the Army Reserve. Fifty-nine percent of the Army Reserve Soldiers interviewed have not considered transferring to another component or sister service. Among those Army Reserve Soldiers who considered transfer, their most frequent preference was the Army's Active Component, followed by Air Force and National Guard.<sup>59</sup>

### Service Members' Issues and Concerns

Many Soldiers' comments indicated their lack of interest in continuing their service in the Army Reserve, with or without the TA Program and other incentives.<sup>60</sup> The following comments are a representative sample of the 20,000 plus interviews and surveys provided by the ARARA Study Group. The following comment is illustrative:

The Army is very inflexible when it comes to civilian education. Upon enlistment, soldiers are promised money for education, tuition assistance, etc., but never have the opportunity to use it because of deployments. I am trying to complete my Doctor of Veterinary Medicine Degree and only can pray that I do not get activated. I decided to go into the reserves only because my military service obligation was reduced by 18 months and I would get the Army experience over with sooner. I love the Army and love the Soldiers and NCOs I worked with. I would stay in if I knew I could finish my degree without being snatched up and deployed for 12 to 18 months. The Army must figure out a way of identifying Soldiers to deploy long before they are due, especially in the reserves.<sup>61</sup>

Another Soldier reminds us of young people's pride in serving their country:

During informal counseling sessions I have heard a common theme amongst Soldiers. They are disillusioned with 'Army leadership'. Many Soldiers initially join because of a sense of pride or duty in service. I feel it would be most helpful for the Army to instill the same spirit that the Marine Corps does in their troops. Many Marines I have encountered have had relatively worse experiences in the military than our soldiers and far fewer incentives (like the lack of promotion opportunities and the lack of Tuition Assistance for drilling reservists), but they still want to reenlist because they want to serve the Marines. As far as the Army Reserves go, a me-first attitude prevails rather than a 'good of the service' attitude and I wouldn't be surprised if most Soldiers say that bonuses and benefits are at the top of the reasons people would reenlist rather than better training and better leadership.<sup>62</sup>

A Reserve Junior officer offers this advice:

If you're worried about Junior Officer retention in the Reserve Components, offer up to full student loan repayment and better tuition assistance for Graduate degrees. The \$4,500 per year offered now (when you can get the RRCs to pay it) does not cover the cost of degrees like an MBA/EMBA. You'd lock in the officer for at least another 4-6 year obligation. If anything, RC Soldiers give up more by staying in than their AC counterparts because our continued membership does damage our promotion and retirement standing with our civilian employers. The Army needs to wake up to this and pay us back for staying committed to the RC.<sup>63</sup>

These comments are corroborated by the observations of another junior officer:

I am a currently deployed First Lieutenant and find myself in a position where I must choose between my career and continued participation in the Reserve. Since my career plan involves moving into the private sector, the ever-looming threat of continued deployment is forcing me to make that choice. I am willing to serve and the Army is free to deploy me as long as the Army needs me: be it 1 year or 5 years. However, when a Soldier returns home and works to build a career only to be deployed again after a year, or less, we place both the Soldier and employer in a position where they must choose. The Reserve will lose every time. Whether I take one class or one hundred through tuition assistance, as an officer I incur an additional 4-year service obligation that begins at the end of the last class taken. I do not consider TA a 'benefit' of service per se, but an additional contractual obligation. In a time when post-graduate education is becoming increasingly necessary to remain competitive in both military and civilian sector, TA should be a benefit for all who serve and not selectively applied. Reservists are losing jobs because of deployment, yet their health benefits expire six months after that deployment.<sup>64</sup>

Another Reservist criticizes TA:

Reserve TA is capped much too low. Many universities cost more than double the \$4,500 given by TA. While it is a great program and when coupled with Student Loan repayment and the G.I. Bill covers much of the tuition, the simple fact is that these programs are not keeping up with the rising cost of going to school full time. All of these programs are also bogged down by much red-tape.<sup>65</sup>

This Reservist complains about a lack of information on educational benefits:

My unit does not have anyone who is really understanding of the resources available to me for my tuition assistance. I want to get more schooling done but I can't get any info from anyone in the Unit. There is no "source" or person for me to go to about my questions about starting my tuition.<sup>66</sup>

Another Reservist offers a familiar complaint about red tape:

I wish the incentives and benefits I have access to now be simpler to get started, and keep working for me. Student loan repayment is a pain, tuition assistance has improved though, and, well, health care for veteran reservists makes my blood boil. Working full time, going to school full time, being deployed, keeping up the obligations of my contract doesn't leave me a lot of time to shuffle paperwork or even find it to get these great incentives or benefits started or continued working. So how about making the benefits I got work better before giving me more I can't start because it is a red tape government paperwork circus and or nightmare. Sometimes I think at least taxes are easy.<sup>67</sup>

As these survey commentaries reveal, potential recruits are very interested in education, health care, retirement, predictability, and stability. Most soldiers either joined or would have joined without a bonus. This indicates that other benefits may be more effective than lump-sum bonuses.

## Summary

The results of this analysis will significantly impact the Army Reserve and will support the GWOT in sustaining a campaign-capable expeditionary Army Reserve by providing an alternative to enlistment bonuses for manning the force. The immediate

Army Reserve benefit is increased return on investment in TA expenditures. The long-term benefit will be improved recruitment and retention of Soldiers in the Army Reserve, thereby enhancing the possibility of achieving and maintaining the statutory end-strength.<sup>68</sup>

The Center for Strategic and International Studies (CSIS) conducted a study of the impacts of on-going operations on the Army Reserve. The military recruiting environment is the most challenging in the history of the all-volunteer force. The study concluded that new approaches to recruiting and retention are needed. In the recruiting area, CSIS recommended that the Army Reserve consider offering a two-year protection from deployments to individuals who are leaving the active military who want to join the Reserves.<sup>69</sup>

In terms of retention, CSIS strongly recommended that DoD make every effort to limit mobilizations to one year or less. Long deployments are affecting retention and eroding family and employer support for the Army Reserve. Another CSIS recommendation was for the transfer of educational benefits to spouses. The study found that in order to retain spousal support for a more operational reserve, the military services need to provide more tangible incentives for spouses to buy in to service in the Army Reserve, specifically educational benefits such as tuition assistance.<sup>70</sup>

There are many ways to improve retention. For example ARFORGEN should be implemented as designed, assuring Soldiers a minimum of four years at home station between deployments. Education programs need better administrative support. Soldiers need easier, quicker access to these programs. Improving Army Reserve TA programs will enable the Army Reserve to meet its recruiting and retention objectives.<sup>71</sup>

Contractors have been assigned to the RRCs to help manage the backlog of TA applications left in the WEBS import files. Consider making these positions permanent and turning them into Department of the Army civilian level positions, rather than outsourcing them. Provide some type of training to the personnel assigned to deal with TA. No training actually exists within the RRCs to better prepare the contractor on how to manage TA. Frustrated Soldiers may join another service or simply quit military service. A single method of payment of TA invoices is easier to track and report through the chain of command.

The Commission correctly concludes that DoD has declared the Reserves to be operational and has developed plans to use them operationally for the foreseeable future, but has not provided the requisite support or made the changes necessary to ensure their sustainability in that role.<sup>72</sup> DoD and Congress have had no serious public discussion or debate on the matter; these leaders have not formally designated the operational reserve. Steps taken by DoD and Congress have been more reactive than proactive, more timid than bold, and more incremental than systemic. Congress and DoD have not reformed the laws and policies governing the reserve components in ways that will sustain an operational force.<sup>73</sup> Another recommendation to Congress and DoD pertains to the need to establish priorities for and appropriately fund missions that the reserves will perform in their strategic and operational roles, in peacetime and wartime, at home and abroad.

Congress and DoD must upgrade DoD's personnel management system to attract and retain the best and brightest of the 21st-century workforce.<sup>74</sup> DoD should develop realistic plans to implement its force generation models, which are supposed to improve



force providers' access to manpower and provide predictability regarding deployments to combatant commands, the services, individual service members, their families, and civilian employers. Service members, their families, and their employers need enhanced support.<sup>75</sup> DoD's organizational structure should eliminate outmoded stovepipes, stop segregating reserve functions from their active component counterparts, and help bridge the active-reserve cultural divide.

### Recommendations

- DoD and Congress should reform the existing laws and policies governing the reserve components to enable an operational reserve given the government-wide consensus regarding the important role of the Reserve forces.
- The Army Reserve should fully activate the ECS Enlisted Program to allow future candidates to join the Army Reserve for a 6-year enlistment, with the guarantee that they will not be mobilized during their first two years of college.
- The Army Reserve should maintain educational assistance statistics to enable the review and study of usage, completion rates, and cost data correlated with Army Reserve recruiting and retention goals and objectives.
- The Army Reserve should investigate the feasibility of implementing a full student loan repayment plan for officer personnel or a four-year funded degree program for a four-year obligation of Reserve service.
- DoD, Army, and the Army Reserve should review educational assistance policies and streamline the administration and execution processes for all education assistance programs to ensure the programs are accessible and are equitably implemented across the enlisted and officer populations.

- The Army and the Army Reserve should commit to a rotation policy for Army and Army Reserve Soldiers that can be honored, even if changed over time due to operational commitments (i.e. Restated ARFORGEN cycle based on national security requirements). Soldiers, family members, and employers need predictability to maintain balance between Army Reserve, civilian job, education, and family requirements.
- The Army Reserve should compare the benefits of educational assistance programs with the national cost average for tuition and fees of universities and colleges and make appropriate cost adjustments, where feasible.
- The Army Reserve should conduct a position description assessment of the Education Services Specialist positions throughout the command to determine if the number is adequate to handle the Army Reserve education assistance workload. Also it should determine whether the knowledge level and training requirements for the Reserve Program are resident and available. It should then consider additional education assistance services to fulfill the educational endeavors and requirements of Army Reserve Soldiers.
- The Army Reserve should review its administrative tuition disbursement processes and procedures required to process and monitor educational assistance programs to determine if streamlining is feasible.

### Conclusion

This analysis has shown that inadequate Tuition Assistance, if not given the required urgency, may result in the loss of high-quality Soldiers. Increasing the combat readiness of the Army Reserves may prove futile if the end strength objective is not

attained. The way ahead for achieving the end-strength is a flexible Tuition Assistance Program with appropriate funding to fully support the incentive. A well-managed Tuition Assistance Program will increase recruitment and retention, which will help us achieve the Army Reserve end-strength goal, allow us to fully implement the ARFORGEN concept, and enable us to satisfy the requirements of an operational reserve. In doing so, we provide predictability for Soldiers, families and employers, close the gap between active and reserve component Soldiers, continue the development of an educated force and do a better job of caring for Soldiers and families. We need a new road map for creating an operational reserve. It should recommend significant changes to the laws, regulations, policies, and funding mechanisms, to recruit and retain quality Soldiers by supporting their educational needs through an equitable, fully funded Tuition Assistance Program.<sup>76</sup>

The more skilled, trained, and educated our Soldiers are, the better our Army Reserve will be.<sup>77</sup>

## Endnotes

<sup>1</sup> Commission on the National Guard and Reserves, *Transforming the National Guard and Reserves into a 21st-Century Operational Force*, Final Report to Congress and the Secretary of Defense (Arlington, VA: Commission on the National Guard and Reserves, 31 January 2008), 10.

<sup>2</sup> Ibid.

<sup>3</sup> U.S. Department of the Army, *2007 Army Modernization Plan* (Washington, D.C.: U.S. Department of the Army, 2007), 1.

<sup>4</sup> U.S. Army Reserve, *2007 Posture Statement* (Washington, D.C.: U.S. Army Reserve 2007), 2.

<sup>5</sup> U.S. Army Recruiting Command, “*Army Strong*,” briefing slides with scripted commentary, available from <http://www.usarec.army.mil>; Internet; accessed 9 November 2007.

<sup>6</sup> Ibid.

<sup>7</sup> *The United States Army Reserve Homepage*, available from <http://www.armyreserve.army.mil>; Internet; accessed 8 December 2007.

<sup>8</sup> Commission on the National Guard and Reserves, *Transforming the National Guard and Reserves into a 21st-Century Operational Force*, 51.

<sup>9</sup> *Ibid.*, 55.

<sup>10</sup> *Ibid.*

<sup>11</sup> *Ibid.*, 56.

<sup>12</sup> *Ibid.*, 64.

<sup>13</sup> U.S. Army Reserve, *2007 Posture Statement*, 4.

<sup>14</sup> Commission on the National Guard and Reserves, *Transforming the National Guard and Reserves into a 21st-Century Operational Force*, 68.

<sup>15</sup> *Ibid.*, 71.

<sup>16</sup> *Ibid.*, 72.

<sup>17</sup> U.S. Department of the Army, *2007 Army Modernization Plan*, 4.

<sup>18</sup> U.S. Army Reserve, *2007 Posture Statement*, 11.

<sup>19</sup> Association of the United States Army, *Transforming the U.S. Army Reserve to an Operational Force* (Washington, D.C.: Association of the United States Army, October 2007), 2; available from [http://www.ausa.org/webpub/DeptILW.nsf/byid/WEBP-785V99/\\$File/TB%20TransformArmyReserve.pdf](http://www.ausa.org/webpub/DeptILW.nsf/byid/WEBP-785V99/$File/TB%20TransformArmyReserve.pdf); Internet; accessed 9 November 2007.

<sup>20</sup> U.S. Army Training and Doctrine Command Analysis Center, "U.S. Army Reserve Accession and Retention Analysis" briefing slides, available from Army Knowledge Online, accessed 7 December 2007.

<sup>21</sup> Christine E. Wormuth, *The Future of the National Guard and Reserves: The Beyond Goldwater-Nichols Phase III Report* (Washington, D.C.: Center for Strategic and International Studies, July 2006), 92; available from [http://www.csis.org/media/csis/pubs/bgn\\_ph3\\_report.pdf](http://www.csis.org/media/csis/pubs/bgn_ph3_report.pdf); Internet; accessed 27 December 2007.

<sup>22</sup> Commission on the National Guard and Reserves, *Transforming the National Guard and Reserves into a 21st-Century Operational Force*, 53.

<sup>23</sup> Wormuth, 92.

<sup>24</sup> U.S. Army Reserve, *2007 Posture Statement*, 32.

<sup>25</sup> U.S. Army Accessions Command, "Army Reserve Accessions Strategy Concept Brief," briefing slides, available from Army Knowledge On-line.

<sup>26</sup> Jan Murphy, "Students May Have Fewer Loans for College," *Harrisburg Patriot-News*, 22 February 2008, A1.

<sup>27</sup> Commission on the National Guard and Reserves, *Transforming the National Guard and Reserves into a 21st-Century Operational Force*, 72.

<sup>28</sup> *Ibid.*, 76.

<sup>29</sup> *Ibid.*, 77.

<sup>30</sup> U.S. Congressional Budget Office, *Issues That Affect the Readiness of the Army National Guard and Army Reserve*, CBO Testimony (Washington, D.C.: U.S. Congressional Budget Office, 16 May 2207), 7.

<sup>31</sup> *Ibid.*

<sup>32</sup> Commission on the National Guard and Reserves, *Transforming the National Guard and Reserves into a 21st-Century Operational Force*, 78.

<sup>33</sup> *Ibid.*, 80.

<sup>34</sup> *Ibid.*, 10.

<sup>35</sup> *Ibid.*, 78.

<sup>36</sup> *Ibid.*

<sup>37</sup> *Ibid.*, 80.

<sup>38</sup> *Ibid.*

<sup>39</sup> Association of the United States Army, *Transforming the U.S. Army Reserve to an Operational Force*, 3.

<sup>40</sup> U.S. Department of the Army, *Army Continuing Education System*, Army Regulation 621-5 (Washington, D.C.: U.S. Department of the Army, 11 July 2006), 32.

<sup>41</sup> U.S. Army Reserve, *2007 Posture Statement*, 30.

<sup>42</sup> U.S. Department of the Army, *Army Continuing Education System*, 32.

<sup>43</sup> U.S. Army Reserve Command, *Lean Six Sigma U.S. Army Reserve Charter* (Atlanta, GA: Deputy Chief of Staff, G-1,n.d.). Report provided to author via email from Jose A. Mojica, Deputy Chief of Staff, G-1,13 December 2207.

<sup>44</sup> Office of the Chief Army Reserve Command, *Army Reserve Tuition Assistance (TA) Study*, Proposal Number: OCAR-4 (Arlington, VA: Office of the Chief Army Reserve Command, 30 September 2008). Report provided to author via email from Terese A. Sweet, Army Study Program Management Office, G-8 Pentagon.

<sup>45</sup> U.S. Army Reserve Command, *Lean Six Sigma U.S. Army Reserve Charter*.

<sup>46</sup> Stand-To, "Army Reserve: Voluntary Education Service", 19 December 2007; available from <http://www4.army.mil/news/standto.php?dte=2007-12-19>; Internet, accessed 19 December 2007.

<sup>47</sup> Ibid.

<sup>48</sup> Ibid.

<sup>49</sup> Association of the United States Army, *Transforming the U.S. Army Reserve to an Operational Force*, 4.

<sup>50</sup> U.S. Army Reserve, *2007 Posture Statement*, 26.

<sup>51</sup> "DoD Announces Recruiting and Retention Number for FY 2007", *Defense Link News*, 10 October 2007; available from <http://www.defenselink.mil>; Internet; accessed 8 January 2007.

<sup>52</sup> U.S. Army Accessions Command, "Army Reserve Accessions Strategy Concept Brief," briefing slides, available from Army Knowledge On-line.

<sup>53</sup> Ibid.

<sup>54</sup> Ibid.

<sup>55</sup> U.S. Army Reserve Command, *Lean Six Sigma U.S. Army Reserve Charter*.

<sup>56</sup> U.S. Army, *Web-Enabled Education Benefit System (WEBS) Home Page*, available from <https://rcms.ocar.army.pentagon.mil/Education/Unsecured/Login.aspx?ReturnUrl=%2feducation%2f>; Internet; accessed 21 December 2007.

<sup>57</sup> U.S. Army Reserve Command, *Lean Six Sigma U.S. Army Reserve Charter*.

<sup>58</sup> U.S. Army Training and Doctrine Command Analysis Center, "U.S. Army Reserve Accession and Retention Analysis".

<sup>59</sup> Ibid.

<sup>60</sup> Ibid.

<sup>61</sup> Ibid.

<sup>62</sup> Ibid.

<sup>63</sup> Ibid.

<sup>64</sup> Ibid.

<sup>65</sup> Ibid.

<sup>66</sup> Ibid.

<sup>67</sup> Ibid.

<sup>68</sup> Ibid.

<sup>69</sup> Wormuth, 7.

<sup>70</sup> Ibid., A-9.

<sup>71</sup> U.S. Army Training and Doctrine Command Analysis Center, “U.S. Army Reserve Accession and Retention Analysis”.

<sup>72</sup> Commission on the National Guard and Reserves, *Transforming the National Guard and Reserves into a 21st-Century Operational Force*, 86.

<sup>73</sup> Ibid., 87.

<sup>74</sup> Ibid.

<sup>75</sup> Ibid.

<sup>76</sup> Ibid.

<sup>77</sup> U.S. Army Recruiting Command, “*Army Strong*”.